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Salesforce Service Offerings

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Driving Digital Transformation with Salesforce

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Driving Digital Transformation with Salesforce

Methods helps organisations realise greater value from Salesforce through end-to-end consulting, implementation, integration and support services. As an NCSC-assured Salesforce Consulting Partner, we combine deep public sector expertise with specialist Salesforce capabilities to help organisations modernise services, strengthen governance and security, improve customer and stakeholder experiences, enable AI-driven innovation and make better use of data. Our services support the full lifecycle, from defining the right approach and modernising processes, through to implementing, integrating, securing and continuously optimising Salesforce solutions that are connected, user-centred and built to deliver lasting value.

Challenge

Organisations need to modernise services, improve customer and stakeholder experiences, strengthen security and governance, and make better use of their data, while maximising the value of their Salesforce investment. However, legacy processes, disconnected systems, integration challenges and evolving security and AI requirements can make it difficult to prioritise the right improvements and create connected, scalable services that meet changing user and business needs.

Salesforce Overview

With capabilities spanning Service Cloud, Experience Cloud, Sales Cloud, Public Sector Solutions, Agentforce, Data Cloud, MuleSoft and Tableau, Salesforce provides a broad platform for delivering connected, data-driven and user-centred services. It enables organisations to modernise operations, connect data and systems, improve service delivery, strengthen governance and security, and introduce AI-driven capabilities, creating a more efficient and adaptable organisation that is better equipped to respond to changing needs.

Salesforce Service Offerings

Salesforce Health Check: Provides a clear view of the health of the Salesforce environment, identifying risks, improvement opportunities and prioritised actions to strengthen performance, security, governance and value.

Salesforce Process Modernisation Workshop: Identifies opportunities to modernise and simplify business processes using Salesforce, helping organisations prioritise improvements and define a clear roadmap for transformation.

Agentforce Enablement for Salesforce: Helps organisations identify and develop valuable Agentforce use cases, establishing the foundations for secure, governed and scalable adoption of AI within Salesforce.

Salesforce Integration & API Enablement: Connects Salesforce with applications, services and data across the organisation, improving interoperability, automation and the secure flow of information between systems.

Salesforce Native Events Management: Enables organisations to manage events and associated processes within Salesforce, creating more connected user experiences and reducing reliance on disconnected systems and manual processes.

Salesforce Security Assurance: Assesses and strengthens security across Salesforce environments, helping organisations identify risks, improve governance and establish a secure foundation for ongoing Salesforce adoption and development.

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Salesforce Health Check

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Salesforce Health Check

Service Definition

The Salesforce Health Check provides a structured assessment of an existing Salesforce environment, evaluating platform configuration, security, data quality, automation, integrations, reporting, governance and user adoption. The service delivers an evidence-based view of platform health and identifies opportunities to improve performance, reduce risk and maximise value from Salesforce investments.

Service Description

Over time, Salesforce environments can become increasingly complex as new functionality, integrations, processes and user requirements are introduced. Without regular review, organisations can accumulate technical debt, governance challenges and user adoption issues that limit the value delivered by the platform.

Methods' Salesforce Health Check combines technical analysis with stakeholder engagement to assess how effectively Salesforce supports organisational goals. We evaluate configuration, security, automation, data management, integrations, reporting and governance arrangements to identify strengths, risks and opportunities for optimisation.

The service provides a clear understanding of the current state of the platform, highlighting areas where improvements can be made to improve usability, security, performance and operational efficiency. Findings are translated into practical recommendations and prioritised actions, enabling organisations to make informed decisions about future investment, optimisation and transformation initiatives.

Customer Outcomes

Organisations gain a clear understanding of the effectiveness, maturity and health of their Salesforce environment. Security, governance, adoption and technical risks are identified early, helping to reduce operational and delivery risk.

The service provides a prioritised roadmap for improvement, enabling stakeholders to focus investment where it will deliver the greatest value. Users benefit from a more effective and scalable platform, while technical teams gain actionable recommendations that support future optimisation, modernisation and long-term platform success.

Salesforce Health Check

Features

- Methods provides a comprehensive assessment of the Salesforce platform from both a technical and business perspective
- Review of security, governance and compliance readiness
- Evaluation of user adoption and platform utilisation
- Identification of technical debt and optimisation opportunities
- Assessment of data quality and management practices
- Analysis of automation, reporting and integrations
- Review of platform scalability and resilience
- Prioritised risks, issues and opportunities
- Practical recommendations aligned to business objectives
- Actionable roadmap for improvement and investment

Benefits

- Increased confidence in platform performance
- Reduced operational and delivery risk
- Improved governance and security posture
- Better user experience and adoption
- More reliable data for decision-making
- Enhanced platform efficiency and effectiveness
- Greater value from existing Salesforce investment
- Improved readiness for future transformation
- Reduced complexity and technical debt
- Clear direction for continuous improvement

Salesforce Process Modernisation Workshop

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Salesforce Process Modernisation Workshop

Service Definition

The Salesforce Process Modernisation Workshop helps organisations assess, redesign and optimise business processes before implementing or enhancing Salesforce solutions. Through stakeholder engagement, process mapping and service design techniques, the workshop creates a clear understanding of current challenges and defines future-state processes that align to business objectives and user needs.

Service Description

Successful Salesforce implementations start with understanding how services operate today and where improvements can be made. The Salesforce Process Modernisation Workshop brings together business stakeholders, service owners and subject matter experts to review existing processes, identify pain points and explore opportunities for improvement.

Methods facilitates structured workshops that map current-state processes, uncover inefficiencies, risks and workarounds, and establish a shared understanding of operational challenges. Using service design principles and Salesforce expertise, we then design improved future-state processes that are more efficient, scalable and user-centred.

Outputs typically include current and future-state process maps, prioritised recommendations, implementation considerations and a roadmap for change. By focusing on outcomes before technology, organisations can ensure Salesforce capabilities are configured to support genuine business improvement rather than simply replicating existing processes.

Customer Outcomes

Organisations gain greater clarity and alignment before investing in Salesforce delivery, reducing implementation risk and improving stakeholder confidence. Future-state processes are designed around business objectives and user needs, creating a stronger foundation for successful adoption.

The workshop helps reduce inefficiencies, improve service delivery and create clearly defined requirements that support faster and more effective implementation. The result is a practical roadmap for transformation that aligns people, processes and technology around a shared vision for success.

Salesforce Process Modernisation Workshop

Features

- Collaborative discovery of current business processes
- Identification of service pain points and inefficiencies
- User-centred assessment of operational challenges
- Future-state process design aligned to business goals
- Evaluation of automation and optimisation opportunities
- Alignment of processes to Salesforce capabilities
- Stakeholder engagement and consensus building
- Prioritised recommendations for improvement
- Identification of dependencies, risks and constraints
- Practical roadmap for process transformation

Benefits

- Improved service efficiency and productivity
- Reduced complexity and manual effort
- Stronger alignment between teams and stakeholders
- Better user and customer experiences
- Clearer requirements for Salesforce delivery
- Reduced implementation and change risk
- Faster and more informed decision-making
- Improved operational consistency
- Greater confidence in transformation initiatives
- Increased value from future Salesforce investment

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Agentforce Enablement for Salesforce

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Agentforce Enablement for Salesforce

Service Definition

Agentforce Enablement helps organisations adopt Salesforce AI capabilities in a secure, governed and outcome-focused way. The service supports AI readiness assessment, use case identification, governance design, implementation planning and adoption enablement, helping organisations realise value from Agentforce while maintaining appropriate oversight, security and control.

Service Description

Many organisations recognise the potential of AI but struggle to identify where it can deliver meaningful business value. Methods helps organisations move beyond experimentation by identifying practical Agentforce use cases that align with business priorities, operational challenges and user needs.

Through stakeholder workshops, readiness assessments and governance planning, we evaluate organisational maturity across people, process, technology, governance and data. We then define a roadmap for adoption that includes trusted data foundations, human oversight, success measures and implementation priorities.

Whether supporting discovery, proof of value or scaling existing AI capabilities, Methods provides the expertise needed to introduce Agentforce responsibly, securely and effectively.

Customer Outcomes

Organisations gain a clear understanding of where AI can deliver measurable value and how Agentforce can support service improvement, efficiency and innovation. Governance and oversight are embedded from the outset, helping to build confidence in AI adoption.

The result is a practical, lower-risk path to AI-enabled service delivery that improves operational efficiency, enhances user experiences and supports long-term innovation.

Agentforce Enablement for Salesforce

Features

- Assessment of organisational AI readiness
- Identification of high-value AI use cases
- Evaluation of governance and risk considerations
- Development of responsible AI operating models
- Definition of success measures and adoption criteria
- Assessment of data readiness and quality
- Pilot planning and implementation support
- Human oversight and escalation framework design
- User engagement and adoption planning
- Roadmap for scalable Agentforce deployment

Benefits

- Faster adoption of AI capabilities
- Improved employee productivity and efficiency
- Reduced manual and repetitive work
- More responsive and intelligent services
- Greater confidence in AI-driven decision support
- Stronger governance and risk management
- Increased innovation across business functions
- Better return on Salesforce investments
- Enhanced user and stakeholder experiences
- Sustainable and scalable AI adoption

Salesforce Integration & API Enablement

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Salesforce Integration & API Enablement

Service Definition

Salesforce Integration & API Enablement helps organisations connect Salesforce securely with enterprise systems, third-party platforms and operational applications. The service delivers scalable integration architectures, API-led connectivity and governance arrangements that improve interoperability, information flow and service delivery.

Service Description

Disconnected systems often create duplication, manual effort and inconsistent information across the organisation. Methods helps organisations design and implement integration solutions that position Salesforce as part of a wider connected ecosystem.

We assess existing systems, interfaces, data flows and business processes before defining integration strategies and target architectures. Using Salesforce APIs, MuleSoft and modern integration approaches, we design, build and deploy secure, reusable and scalable connectivity solutions.

The service includes architecture design, implementation, testing, operational readiness and knowledge transfer, ensuring integrations remain maintainable and aligned to long-term organisational needs.

Customer Outcomes

Organisations benefit from improved interoperability, greater data consistency and reduced manual effort across business processes. Teams gain access to more reliable information, enabling faster decision-making and improved operational efficiency.

The result is a scalable integration foundation that supports future transformation initiatives while reducing technical debt and improving service performance.

Salesforce Integration & API Enablement

Features

- Assessment of integration and connectivity requirements
- Integration architecture and strategy development
- API-first design and implementation approach
- Secure connectivity between systems and platforms
- MuleSoft and Salesforce integration expertise
- Real-time and event-driven integration patterns
- Data flow and process orchestration design
- Monitoring and operational readiness support
- Detailed documentation, knowledge transfer and outcome reporting
- Scalable integration roadmap and governance model

Benefits

- Improved information flow across systems
- Reduced duplication of effort and data
- More efficient business processes
- Better visibility across services and operations
- Increased reliability of enterprise data
- Reduced operational silos
- Greater agility for future transformation
- Improved user and customer experiences
- Reduced integration complexity and technical debt
- Stronger foundation for digital innovation

Salesforce Native Events Management

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Salesforce Native Events Management

Service Definition

Salesforce Native Events Management provides a Salesforce-centred solution for planning, promoting, administering and evaluating events. The service creates a single source of truth for registrations, attendees, communications and reporting, helping organisations manage the complete event lifecycle within Salesforce.

Service Description

Many organisations rely on spreadsheets, email chains and disconnected systems to manage events, making administration time-consuming and reporting difficult. Methods helps organisations centralise event management within Salesforce using native capabilities and Experience Cloud functionality.

The service supports event planning, registration management, attendee communications, self-service experiences, reporting and governance controls. Discovery activities identify operational requirements, user needs and existing challenges before a scalable solution is configured and deployed.

Methods combines Salesforce expertise, service design and business transformation experience to deliver solutions that improve operational efficiency while enhancing attendee and administrator experiences.

Customer Outcomes

Organisations reduce administrative effort, improve governance and gain greater visibility of event performance. Users benefit from smoother registration and communication processes, while administrators gain access to accurate, trusted event data.

The result is a more efficient, scalable and user-centred approach to event management that improves stakeholder engagement and reporting across the organisation.

Salesforce Native Events Management

Features

- Centralised management of the event lifecycle
- Automated registration and attendee management
- Self-service event experiences through Salesforce
- Streamlined communications and notifications
- Enhanced reporting and event performance tracking
- Secure and governed event management processes
- Improved visibility of stakeholder engagement
- Scalable event administration model
- Integration with wider Salesforce capabilities
- Consistent processes for event delivery and management

Benefits

- Reduced administrative effort and overhead
- Improved attendee and organiser experience
- Greater operational efficiency
- Better event visibility and reporting
- Increased stakeholder engagement
- More consistent event delivery
- Improved governance and compliance
- Reduced reliance on spreadsheets and manual processes
- Stronger data quality and management
- Scalable platform for future growth

Salesforce Security Assurance

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Salesforce Security Assurance

Service Definition

Salesforce Security Assurance embeds security, governance and compliance throughout the Salesforce delivery lifecycle. The service combines security architecture, risk assessment, control validation and assurance activities to help organisations deliver secure and compliant Salesforce services.

Service Description

Security is a critical component of successful Salesforce delivery, particularly within public sector and regulated environments. Methods integrates assurance activities throughout delivery rather than treating security as a final approval exercise.

The service reviews identity and access management, sharing models, data protection, integrations, operational security and governance arrangements. Security specialists work closely with delivery teams and stakeholders to identify risks, assess controls and establish clear evidence trails for governance and compliance requirements.

Findings are translated into practical recommendations that strengthen security while supporting delivery objectives and user needs.

Customer Outcomes

Organisations gain increased confidence that Salesforce solutions are secure, resilient and aligned to regulatory and organisational requirements. Risks are identified earlier, reducing the likelihood of costly remediation later in delivery.

The result is improved compliance readiness, stronger governance, enhanced auditability and a more secure Salesforce environment that supports long-term operational success.

Salesforce Security Assurance

Features

- Security assurance embedded throughout delivery
- Assessment of security architecture and design
- Review of identity, access and sharing controls
- Threat modelling and risk assessment activities
- Validation of data protection measures
- Assessment of integrations and third-party dependencies
- Evidence-based governance and compliance support
- Security control testing and assurance reviews
- Pre-live readiness and risk mitigation activities
- Traceability and audit support throughout delivery

Benefits

- Reduced security and compliance risk
- Improved confidence in Salesforce solutions
- Stronger governance and accountability
- Earlier identification of vulnerabilities and gaps
- Reduced remediation effort and cost
- Faster assurance and approval processes
- Improved audit readiness
- Enhanced operational resilience
- More secure and trusted services
- Greater confidence at go-live and beyond



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